

## Message Text

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E.O. 11652: N/A

TAGS: EFIS, JA

SUBJECT: JAPANESE FISH OIL AND FISH MEAL EXPORTS

REF: STATE 170188

1. PLEASE PASS INFORMATION BELOW TO NATIONAL MARINE FISHERIES SERVICE IN RESPONSE TO QUESTIONS RAISED IN REF.

2. PRESS REPORTS OF POSSIBLE 2.0 MILLION MT SARDINE CATCH THIS YEAR NOT VERIFIED BY INDUSTRY AND SCIENTISTS WORKING ON SARDINE STOCKS. CATCH WILL LIKELY DE IN NEIGHBORHOOD OF 1.4 MMT CLOSE TO THAT OF 1977. NUMBER OF VESSELS FISHING SARDINE IN 1978 REMAINS SAME AS IN 1977 DUE TO JAPANESE LAWS REGULATING FISHERY. NEW VESSELS MAY ENTER FISHERY ONLY IF SAME NUMBER ARE RETIRED. CONSIDERABLE MODERNIZATION AND REPLACEMENT HAS OCCURRED. FLEET IS CAPABLE OF TAKING MORE SARDINE BUT RESOURCE SIZE PROBABLY WILL NOT SUSTAIN ANY GREATER PRODUCTION THIS YEAR. LIKEWISE PROCESSING CAPABILITY AVAILABLE THIS YEAR PROBABLY NO DETERRENT TO INCREASED PRODUCTION.

3. EVEN IF CATCH OF SARDINE THIS YEAR IS NO MORE THAN THAT OF 1977, MEAL AND OIL PRODUCTION COULD INCREASE SIGNIFICANTLY

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CANTLY DEPENDING ON USE AFTER HARVESTING. 1976 LANDINGS OF 731,378 MT AT 66 PORTS WAS USED AS FOLLOWS: (TOTAL SARDINE LANDINGS AT ALL PORTS WAS 1.1 MMT). MARKET FRESH 179,613 MT; CANNED 39,875 MT; FROZEN AND PROBABLY USED AS FOOD IN YELLOWTAIL CULTURE 203,823 MT; FISH MEAL AND OIL 254,570 MT; OTHER FOR HUMAN CONSUMPTION 50,045 MT. CONSIDERABLE LATITUDE EXISTS FOR CHANGE IN USE DEPENDING ON MARKET

FACTORS.

4. MAJOR SOURCE FOR FISH MEAL IS ALASKA POLLOCK. OF 1976 LANDINGS OF 1.38 MMT AT 66 PORTS (DOES NOT INCLUDE MOTHER-SHIP CATCH) FOLLOWING USE WAS MADE: MARKETED FRESH 167,997 MT; FROZEN 22,698 MT; SURIMI 918,638 MT; FISH MEAL AND OIL 135,591 MT. OTHER HUMAN CONSUMPTION 141,045 MT. ONLY ABOUT 20 PERCENT OF WEIGHT OF FISH IS USED IN SURIMI PRODUCTION. ALTHOUGH WE ARE UNABLE TO CONFIRM, REMAINDER IS PROBABLY REDUCED TO FISH MEAL. THUS OF 918,638 MT FOR SURIMI IN 1976 ABOUT 700,000 MT EVENTUALLY COULD HAVE BEEN PROCESSED INTO 140,000 MT OF FISH MEAL. TOTAL FISH MEAL FROM POLLOCK MOTHERSHIPS AND ALL PORTS MAY HAVE BEEN AS HIGH AS 400,000 MT IN 1976. LARGE REDUCTION IN POLLOCK QUOTA IN 1977 AND 1978 IN SOVIET 200 MILE ZONE, IS ONE REASON SHIFT TO SARDINE FOR MEAL APPEARS TO BE TAKING PLACE.

5. JAPAN AQUATIC OIL ASSOCIATION TELLS US THAT IT IS TOO EARLY TO PREDICT PRODUCTION IN 1978 BUT ASSURED US THAT BOTH MEAL AND OIL PRODUCTION WILL BE HIGHER IN 1978 THAN IN 1977. PRODUCTION IN LAST THREE YEARS FROM THEIR RECORDS AS FOLLOWS:

- 1975 1976 1977

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FISH OIL 135.5 140.6 180.0 (PRELIMINARY)

FISH MEAL 789.5 738.2 780.0 (PRELIMINARY)

6. BY COINCIDENCE DOUG SOUTAR, FISH MEAL AUTHORITY WORKING FOR LMR, SAN DIEGO, HAS BEEN CONSULTING WITH US THIS WEEK ON SIMILAR ISSUE. HE SUGGESTS THAT IF WE ARE ABLE TO MAKE FORECAST FOR PRODUCTION IN 1979 AND BEYOND, WHICH IS ANYTHING CLOSE TO REALITY, LMR WILL BE MORE THAN PLEASED TO HIRE US. WE DECLINE TO MAKE FORECAST AT LEAST UNTIL WE BETTER UNDERSTAND VARIABLE USE OF SARDINE AND ACCOMPANYING ECONOMIC FACTORS.

7. FYI IN 1976 APPROXIMATELY 900,000 MT OF FISH WAS USED AS FEED TO PRODUCE ABOUT 100,000 MT OF YELLOWTAIL.

8. ADDITIONAL STATISTICAL DATA BEING POUCHED. MANSFIELD

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